

May 13, 2009

TO: Kathleen McDaniel

FROM: Holly Platz, SPHR  
Director's Review Investigator

SUBJECT: Kathleen McDaniel v. Central Washington University (CWU)  
Allocation Review No. ALLO-08-074

The Director's review of Central Washington University's allocation determination of your position has been completed. The review was based on written documentation. This review covers the six month period prior to June 23, 2008, the date that CWU's Human Resources office received your request for review.

### **Director's Determination**

As the Director's designee, I carefully reviewed all of the documentation in the file including the duties and responsibilities described in your Position Review Request form, your Position Description form, and the information described in the letters of support from David Shorr and Dr. LaRoque Georgeson.

I reviewed the Secretary class series, the Administrative Assistant series, the Building Coordinator series and the Office Assistant series. While some of your duties fit within each of these series, none of the series encompass the total variety of duties assigned to your position or your extensive contact with students and others in carrying out your duties.

I reviewed the Program series and agree with CWU that your position best fits within this series. I specifically considered the Program Assistant and the Program Coordinator classifications. Based on my review of the documents, the available classifications, and my analysis of your assigned duties and responsibilities, I conclude that overall, your position is best described by the Program Assistant classification.

### **Background**

On June 23, 2008, CWU's Human Resource office received your Position Review Request form asking that your Secretary Senior position be reallocated to the Program Coordinator classification. You signed the form on June 13, 2008. Your supervisor completed the supervisor's portion of the form on August 11, 2008.

After receiving your Position Review Request form, CWU reviewed your position and by memorandum dated September 15, 2008, determined that your position should be reallocated to the Program Assistant classification.

On October 14, 2008, you filed a request for a Director's review of your position. In your Director's review request, you asked that your position be reallocated to the Program Coordinator classification.

### **Summary of Ms. McDaniel's Perspective**

You argue that you work within the CWU-Des Moines center and perform specialized tasks for the Early Childhood Education and Elementary Education double major. You assert that you take direction from Dr. David Shorr, Faculty Program Coordinator; Dr. Tina Georgeson, Summer Advisor; and Dr. Cory Gann, Summer Advisor, not from NadaLee Brady, Program Support Supervisor II.

You contend that you have assumed many of the duties formerly performed by Ms. Brady such as handling all of the general education requirements, including reviewing student transcripts and sending out questionnaires, reserve letters, and orientation letters to the program participants. You argue that you exercise independent judgment and have extensive involvement with students as their point of contact for the program. You explain that you provide students with detailed information about the program, explain credit transfers, explain the need to complete application packets, explain how students can attend classes provisionally while waiting for admission into the program, explain fees, resolve problems, and provide applicants with information about their enrollment status. You assert that you update the data tracking spreadsheet. You use the spreadsheet to track and update data which is then used by professors for advising students. In addition, you explain that you are responsible for placing copies of emails in student files and notating necessary information, registering non-matriculated, non-major, elementary education endorsement students, and monitoring students' academic progress reports and degree checkout.

You argue that you perform additional duties to coordinate and schedule classrooms and course activities for classes. You assert that you maintain the quarterly schedules for regular site-based classes and ITV courses; conferences; university, departmental and board meetings; seminars; and training sessions. You also argue that you are responsible for payroll at CWU-Des Moines, that you have signature authority, and that in addition to registering students, you handle tuition payments received from them.

### **Summary of CWU's reasoning**

CWU argues that you report to NadaLee Brady, Program Support Supervisor 2 who reports to Margaret Badgley, Assistant to the Provost for University Centers and Community College Relations at CWU-Des Moines.

CWU contends that you:

- assist center students and faculty with scheduling and access to center facilities and resources
- monitor student progress toward education professional achievements and notify students of needed documents
- coordinate scheduling for classrooms, conference rooms and limited distance education rooms with Highline Community College
- process bi-weekly payroll for student and staff employees

CWU argues that CWU–Des Moines is a specialized or technical program. CWU argues that your duties and responsibilities require you to perform specialized tasks for a unit within the program and to maintain records and coordinate files related to the program operations. CWU asserts that your supervisor is responsible for the coordination and operation of the Center. Therefore, CWU contends that your position best fits within the Program Assistant classification.

### **Rationale for Determination**

Your position is located at the CWU-Des Moines Center located on the Highline Community College campus. You are responsible for a variety of tasks in support of the Center and its academic programs. In your Position Review Request form you describe the purpose of your position as:

Assisting center students and faculty with scheduling and access to center facilities and resources. Monitoring student progress toward education professional achievements and notifying students of needed documents. Coordinate facility scheduling with Highline [Community College] each quarter with particular attention to conference rooms and limited distance ed facilities. Manage student payroll, time keeping and staff leave of absences. Process non-matriculated students. Prepare and organize student orientations with office assistants. [Assist] student and visitor traffic in the office.

Your Position Review Request form, your Position Description form and the organizational charts provided for your review show that your supervisor is NadaLee Brady, Program Support Supervisor 2. While you might receive work direction from Dr. Georgeson and Dr. Gann, neither of them are your supervisor. In her comments on your Position Review Request form, your supervisor indicated that you work independently and clarified that your signature authority is for payroll and correspondence.

In addition, you indicated in your Position Review Request form that you lead or supervise staff and you referred to having been a temporary supervisor. Your supervisor confirmed that your position was temporarily assigned supervisory duties from November 15, 2007 to March 31, 2008, but clarified that you no longer had this responsibility. Based on the information provided by you and your supervisor, I find that at the time of your review request, you were no longer assigned supervisory responsibilities.

It is clear from the letters of support you provided that your work is highly valued and that staff rely on your expertise when they need information. However, the purpose of a position review is to determine which classification best describes the overall duties and responsibilities of a position. A position review is neither a measurement of the volume of work performed, nor an evaluation of the expertise with which that work is performed. A position review is a comparison of the duties and responsibilities of a particular position to the available classification specifications. This review results in a determination of the class that best describes the overall duties and responsibilities of the position. See Liddle-Stamper v. Washington State University, PAB Case No. 3722-A2 (1994).

Your duties and responsibilities, as described by CWU, are:

- 36% scheduling rooms for building 29 at CWU–Des Moines.
- 34% coordinating files for Early Childhood Education, Elementary Education, Electronics Engineering Technology, Industrial Technology, Safety and Health Management, Master of Science Engineering Technology, Master of Professional Accountancy, Master Teacher and Master of Education Administration student applicants.
- 13% assisting program students with questions, making appointments for students to meet with the academic advisor and helping students register and pay required fees.
- 17% providing general customer service, processing bi-weekly payroll, printing quarterly queries on CWU–Des Moines graduates and pulling inactive student files.

In her letter of support, Dr. Georgeson indicates that you provide clerical support to the Education Program at the CWU-Des Moines Center. In his letter of support, Dr. Shorr indicates that you are a point of contact for students seeking information about the program. Dr. Shorr explains that you provide information and explain the program to students; assure that written information is updated; research information and provide information to him when necessary; alert him to potential student problems; and provide assistance to other programs, including the graduate programs.

The class series concept for the Program Assistant and Program Coordinator classifications provides that position within this series:

Perform work requiring knowledge and experience that is specific to a program. Organize and perform work related to program operations independent of the daily administrative office needs of the supervisor. Represent the program to clients, participants and/or members of the public.

A program is a specialized area with specific complex components and discrete tasks which distinguish it from the main body of an organization. A program is specific to a particular subject. The specialized tasks involve interpretation of policies, procedures and regulations, budget coordination/administration, independent functioning and typically, public contact. Duties are not of a general support nature transferable from one program to another. Performance of clerical duties is in support of incumbent's performance of specialized tasks.

Your position fits within the class series concept of the Program classes.

The basic function of the Program Coordinator classification states: “[c]oordinate the operation of a specialized or technical program.”

Your position does not meet the intent of the Program Coordinator basic function. Your supervisor is responsible for overall program operations at CWU-Des Moines. You perform varied and specialized tasks in support of program operations and to assist students and staff.

The distinguishing characteristics for the Program Coordinator classification state:

Under general direction, perform work using knowledge and experience specific to the program. Exercise independent judgment in interpreting and applying rules and regulations. Independently advise students, staff, program participants and/or the public regarding program content, policies, procedures and activities; select/ recommend alternative courses of action and either:

(1) project, monitor, maintain, initiate and/or approve expenditures on program budgets

OR

(2) have extensive involvement with students, staff, the public and/or agencies in carrying out program activities, and coordinate, schedule and monitor program activities to determine consistency with program goals.

In addition, the Department of Personnel Glossary of terms for Classification, Compensation, & Management provides that coordinators "[i]ndependently organize, monitor, evaluate, and make adjustments for a program or activity without supervisory responsibility."

Because of your experience, knowledge and expertise with the program, you work independently with little supervision. You exercise independent judgment in your assigned areas of responsibility. As a point of contact for the program, you have extensive involvement with staff and others about some aspects of the program. However, you do not monitor activities at the program level to determine consistency with program goals and do not make adjustments to the program. Rather you handle tuition payments from students and you assure that program information and tracking tools are updated to reflect changes initiated by others. Your position does not have the depth of program responsibility found in the distinguishing characteristics of the Program Coordinator class.

The basic function of the Program Assistant classification states: "[p]erform specialized technical/clerical duties in support of a program activity."

The distinguishing characteristics for the Program Assistant classification state:

Under general supervision, perform work requiring knowledge and experience specific to the program. Provide students, staff, program participants and/or the public with information and interpretation of policies and activities related to the program specialty. Compose written communications, and establish and maintain records relating to program operations.

The majority of the duties and responsibilities described in your Position Review Request form and by Dr. Georgeson and Dr. Shorr is specialized clerical work that requires knowledge and experience specific to the program. The duties you perform support the program. In addition, you perform technical work when creating and maintaining data tracking tools for the program. You provide information to students, staff and others and you interpret and apply policies as they relate to program activities. You also compose correspondence, including emails, and establish and maintain records and files. The

majority of your work is consistent within the basic function and distinguishing characteristics of the Program Assistant classification.

In addition, while not allocating criteria, the duties of your position are consistent with the typical work statements of the Program Assistant class. For example you:

- Serve as primary contact with program participants and provide information regarding program policies and activities
- Compose correspondence and printed materials
- Compile and distribute information relative to program activities and confer with other campus departments and outside agencies
- Coordinate arrangements for program activities such as meetings and conferences
- Schedule appointments and meetings
- Establish and maintain records and files
- Use spreadsheet and data base software to develop and maintain records

Most positions within the civil service system occasionally perform duties that appear in more than one classification. However, when determining the appropriate classification for a specific position, the duties and responsibilities of that position must be considered in their entirety and the position must be allocated to the classification that provides the best fit overall for the majority of the position's duties and responsibilities. Dudley v. Dept. of Labor and Industries, PRB Case No. R-ALLO-07-007 (2007).

Overall, the majority of the duties and responsibilities assigned to your position are best described by the Program Assistant classification.

### **Appeal Rights**

RCW 41.06.170 governs the right to appeal. RCW 41.06.170(4) provides, in relevant part, the following:

An employee incumbent in a position at the time of its allocation or reallocation, or the agency utilizing the position, may appeal the allocation or reallocation to . . . the Washington personnel resources board . . . . Notice of such appeal must be filed in writing within thirty days of the action from which appeal is taken.

The address for the Personnel Resources Board is 2828 Capitol Blvd., P.O. Box 40911, Olympia, Washington, 98504-0911.

If no further action is taken, the Director's determination becomes final.

cc: Eric Galbraith, CWU  
Classification & Pay Team, DOP